



TEA BOARD OF KENYA

Realizing the Tea Promise

KENYA TEA INDUSTRY PERFORMANCE HIGHLIGHTS FOR JANUARY 2025

PRODUCTION

Tea production for the month of January 2025 was lower by 4.60 Million Kgs (7.8%) to 54.36 Million Kgs compared to 58.96 Million Kgs recorded during the same period of 2024. The output was also slightly lower compared to 54.91 Million Kgs recorded during the corresponding month of 2023. Unlike in 2024, during which the month of January was characterized by good weather conditions occasioned by *El-nino* phenomenon, intermittent severe dry and hot weather conditions was experienced in the month of January this year.

The effect of dry weather on production was more pronounced during the first and third week of the month both in the West of Rift and the East of Rift, respectively. Consequently, production in the West of Rift declined by 2.33 Million Kgs to 36.25 Million Kgs from 38.58 Million Kgs. Similarly, Production in the East of Rift was lower by 2.27 Million Kgs to 18.11 Million Kgs from 20.38 Million Kgs.

Owing to the effects of dry weather conditions, the Smallholder Sub-sector under the Management of KTDA was the most affected, with production dropping by 4.48 Million Kgs from 31.88 Million Kgs recorded during the corresponding month of 2024 to 27.39 Million Kgs. The effects within the state owned Nyayo Tea Zones and the Plantation factories, respectively were minimal while production in the private/Independent tea producers was not affected.



Table 1: Production by Sub-Sector and Region (2025 vis-à-vis 2024)

| Sub-Sector/Producer | Block | Jan. 2025 | Jan. 2024 | Variance +/- | Var.(%) |
|--|---------------------|-------------------|-------------------|---------------------|----------------|
| Estates | West of Rift | 12,729,147 | 13,110,935 | - 381,788 | -2.91% |
| | East of Rift | 450,211 | 436,570 | 13,641 | 3.12% |
| | Total | 13,179,358 | 13,547,505 | -368,147 | -2.72% |
| | | | | | |
| Smallholders-KTDA | West of Rift | 11,275,513 | 13,998,232 | -2,722,719 | - 19.45% |
| | East of Rift | 16,122,055 | 17,886,857 | -1,764,802 | -9.87% |
| | Total | 27,397,568 | 31,885,089 | -4,487,521 | - 14.07% |
| | | | | | |
| Independents | West of Rift | 11,905,641 | 11,152,106 | 753,535 | 6.76% |
| | East of Rift | 1,406,675 | 1,871,263 | -464,588 | - 24.83% |
| | Total | 13,312,316 | 13,023,369 | 288,947 | 2.22% |
| | | | | | |
| Nyayo T. Zones | West of Rift | 340,822 | 320,188 | 20,634 | 6.44% |
| | East of Rift | 135,203 | 190,738 | -55,535 | - 29.12% |
| | Total | 476,025 | 510,926 | -34,901 | -6.83% |
| | | | | | |
| Estates,Smallholder, Independents & Nyayo Tea.Zones | West of Rift | 36,251,123 | 38,581,461 | - 2,330,338 | -6.04% |
| | East of Rift | 18,114,144 | 20,385,428 | -2,271,284 | - 11.14% |
| | Grand Total | 54,365,267 | 58,966,889 | -4,601,622 | -7.80% |

During the month of January, speciality teas produced was 832,927 Kgs, which represented 2% of the total production. Speciality teas were dominated by Orthodox teas

TEA SALES

AUCTION

During January, auction sales volume for Kenya tea stood at 33.76 Million Kgs, which was lower compared to 42.48 million kgs recorded during the corresponding month of last year but higher than that of December 2024, which was 23.72 Million Kgs. The average monthly auction price for Kenya tea was slightly higher at 2.26 USD per Kg against 2.19 USD in the same period of last year and at par with what was recorded in December last year. In addition, absorption of teas on offer was higher at 80% compared to 56% for the same period of last year.

Notably, prices of tea followed the quality, with “Best” category of CTC Leaf and Dust grades (well sorted and those with brighter liquors and appearance) fetching higher prices compared to “medium” and “plainer” categories which attracted discounted prices or no bid by the buyers and consequently constituted the highest proportion of teas on offer at the auction that were withdrawn. Additionally, secondary grades whose volume was lower and reprint offers of particular garden marks also fetched lower prices.

During the month of January 2025, tea offered for sale by the smallholder tea factories whose quality is relatively higher compared to other producers, fetched a weighted average price of 2.62 USD per Kg for the main grades, which was higher compared to an average price of 2.60 USD in the same period of 2024 but lower compared to 2.65 USD recorded in January 2023.

Though there was generally good demand for tea offered at the auction, the prices continued to be impacted negatively by the effect of global economic shock experienced in most countries due to the Russia-Ukraine crisis and market access challenges along the Red Sea route. However, there was generally active participation by buyers to major export destinations at the Auction.

Table 2: Auction Sales (2025 vis-à-vis 2024)

| | 2025 | | 2024 | | 2023 | |
|-------------------|----------------|-------------------|----------------|-------------------|--------------|-----------------------|
| | Vol. M. Kgs | Value (USD/KG) | Vol. M. Kgs | Value (USD/KG) | Vol. M. Kgs | Value (USD/ KG) |
| JAN. | 33.76 | 2.26 | 42.48 | 2.19 | 32.70 | 2.33 |
| FEB. | | | 39.11 | 2.23 | 39.14 | 2.31 |
| MARCH | | | 42.35 | 2.15 | 35.42 | 2.39 |
| APRIL | | | 43.60 | 2.29 | 26.93 | 2.39 |
| MAY | | | 31.05 | 2.18 | 36.75 | 2.19 |
| JUNE | | | 28.47 | 2.14 | 52.94 | 2.09 |
| JULY | | | 34.14 | 2.21 | 26.77 | 2.06 |
| AUGUST | | | 25.11 | 2.20 | 61.16 | 2.25 |
| SEPT. | | | 22.60 | 2.25 | 42.97 | 2.25 |
| OCT. | | | 32.58 | 2.07 | 58.28 | 2.16 |
| NOV. | | | 31.08 | 2.22 | 48.69 | 2.17 |
| DEC. | | | 23.72 | 2.19 | 26.95 | 2.19 |
| TOTAL/AVG. | | | 396.29 | 2.19 | 488.7 | 2.23 |

EXPORTS

The total export volume for January 2025 was slightly lower by 209,775 Kgs from 47.42 Million Kgs recorded in the same period of last year to 47.21 Million Kgs. However, it was higher compared to 46.86 Million Kgs exported during December 2024.

During the month of January, Kenya tea was shipped to sixty-one (61) export destinations compared to fifty-eight (58) for the same period of last year. Pakistan maintained the leading export destination for Kenyan tea, having imported 17.06 Million Kgs, accounting for 36.1% of the total export volume.

Other key export destinations for Kenya tea were Egypt (7.56 Million Kgs, 16%); UK (3.84 Million Kgs, 8.1%); Sudan (2.15 Million Kgs, 4.6%); Russia (2.05 Million Kgs, 4.4%); UAE (1.70 Million Kgs, 3.6%); India (1.58 Million Kgs, 3.3%); Poland (0.94 Million Kgs, 2%); Oman (0.94 Million Kgs, 2%); and China (0.77 Million Kgs, 1.6%).

The top ten export destinations, the majority of which are traditional markets for Kenya tea, accounted for 81.9% of Kenya tea export volume. Apart from the UK, UAE and Poland, the other traditional markets recorded increased imports for Kenya tea. Notably, China and India, which are non-traditional markets recorded significant increase in exports from Kenya. Just like China and India, Australia is also growing rapidly as an emerging market for Kenya tea. During the month there were also shipments to other emerging and seasonal markets such as Jordan, Burkina Faso; Georgia; Congo; Gabon; Malta; Mauritania; Tanzania; Brazil; Cameroon; Senegal; Chile and Malawi.

During the month of January, value added tea exports was 1.38 Million Kgs, which represented 3% of the total export the volume. The exports in value added form were shipped to thirty-four (34) market destinations which included United Kingdom; Somalia; Sudan; USA; Cote D'Ivoire; Yemen; Burkina Faso; Ireland; France; Ghana; Congo DRC; UAE; Kenya (from the EPZ); Malaysia; Gabon; Senegal; Mali; Mauritania; Guinea; India; Taiwan; Malta; Japan; Brazil; Cameroon; South Sudan; Malawi; Mauritius; Australia; Hong Kong; Vietnam; China; Egypt; and Ethiopia. Out of the total value-added tea exports, the United Kingdom accounted for the highest volume at 38%.

LOCAL TEA SALES

Local tea sales for January were lower at 2.88 Million Kgs against 3.30 Million Kgs for the same period of 2024 and 3.02 Million Kgs recorded during the corresponding month of January 2023. It was also slightly lower compared to 3.77 Million Kgs recorded in December 2024.

Table 3: Local Sales Trend

| | 2025 (Million KGS) | 2024 (Million KGS) | 2023 (Million KGS) |
|--------------|---------------------------|---------------------------|---------------------------|
| January | 2.28 | 3.30 | 3.02 |
| February | | 2.83 | 2.92 |
| March | | 2.94 | 2.97 |
| April | | 3.22 | 2.56 |
| May | | 3.32 | 3.08 |
| June | | 2.86 | 2.85 |
| July | | 2.74 | 3.09 |
| August | | 3.28 | 3.71 |
| September | | 2.74 | 2.99 |
| October | | 3.34 | 3.34 |
| November | | 3.26 | 3.31 |
| December | | 3.77 | 3.46 |
| TOTAL | | 37.6 | 37.3 |

Table 4: Kenya Tea Exports by Destination (January 2025 vis-à-vis January 2024)

| DESTINATION | 2025- QUANTITY KGS | 2024- QUANTITY KGS | QUANTITY VARIANCE KGS | %AGE VARIANCE |
|--------------|--------------------------|--------------------------|--------------------------|------------------|
| PAKISTAN | 17,068,599 | 15,904,272 | 1,164,327 | 7.32% |
| EGYPT | 7,568,135 | 7,303,644 | 264,491 | 3.62% |
| UK | 3,848,008 | 5,721,377 | -1,873,369 | -32.74% |
| SUDAN | 2,158,958 | 452,396 | 1,706,562 | 377.23% |
| RUSSIA | 2,057,218 | 1,996,070 | 61,148 | 3.06% |
| UAE | 1,707,781 | 2,776,335 | -1,068,554 | -38.49% |
| INDIA | 1,580,541 | 425,644 | 1,154,897 | 271.33% |
| POLAND | 949,320 | 1,015,071 | -65,751 | -6.48% |
| OMAN | 946,699 | 370,180 | 576,519 | 155.74% |
| CHINA | 771,261 | 404,327 | 366,934 | 90.75% |
| NIGERIA | 745,288 | 252,000 | 493,288 | 195.75% |
| SAUDI ARABIA | 674,706 | 1,429,479 | -754,773 | -52.80% |
| JORDAN | 649,750 | | 649,750 | |
| SWITZERLAND | 548,724 | 608,816 | -60,092 | -9.87% |
| SOMALIA | 545,231 | 625,358 | -80,127 | -12.81% |
| KAZAKHSTAN | 526,104 | 414,107 | 111,997 | 27.05% |
| IRAN | 479,550 | 1,131,570 | -652,020 | -57.62% |
| YEMEN | 410,786 | 1,343,556 | -932,770 | -69.43% |
| SRI LANKA | 397,803 | 273,374 | 124,429 | 45.52% |
| IRELAND | 352,820 | 664,148 | -311,328 | -46.88% |
| GERMANY | 346,658 | 189,660 | 156,998 | 82.78% |
| CHAD | 336,064 | 722,229 | -386,165 | -53.47% |
| NETHERLANDS | 315,104 | 360,455 | -45,351 | -12.58% |
| AFGHANISTAN | 294,801 | 487,688 | -192,887 | -39.55% |
| MALAYSIA | 234,220 | 129,712 | 104,508 | 80.57% |
| UKRAINE | 233,141 | 558,089 | -324,948 | -58.23% |

| DESTINATION | 2025- QUANTITY KGS | 2024- QUANTITY KGS | QUANTITY VARIANCE KGS | %AGE VARIANCE |
|-----------------------------------|--------------------------|--------------------------|--------------------------|------------------|
| AUSTRALIA | 205,220 | 500 | 204,720 | 40944.00% |
| USA | 162,800 | 307,154 | -144,354 | -47.00% |
| QATAR | 109,380 | 144,881 | -35,501 | -24.50% |
| JAPAN | 105,920 | 238,920 | -133,000 | -55.67% |
| SOUTH AFRICA | 100,776 | 233,407 | -132,631 | -56.82% |
| DJIBOUTI | 88,589 | 24,425 | 64,164 | 262.70% |
| GHANA | 85,364 | 28,200 | 57,164 | 202.71% |
| HONG KONG | 72,170 | 29,832 | 42,338 | 141.92% |
| TURKEY | 71,276 | 199,106 | -127,830 | -64.20% |
| COTE D'IVOIRE | 49,156 | 15,522 | 33,634 | 216.69% |
| TAIWAN | 43,976 | 17,960 | 26,016 | 144.86% |
| CANADA | 42,200 | 26,000 | 16,200 | 62.31% |
| FRANCE | 41,472 | 300 | 41,172 | 13724.00% |
| MAURITIUS | 40,000 | 40,000 | 0 | 0.00% |
| BURKINA FASO | 38,808 | | 38,808 | |
| GEORGIA | 27,000 | | 27,000 | |
| VIET NAM | 24,464 | 6,595 | 17,869 | 270.95% |
| CONGO | 22,298 | | 22,298 | |
| SOUTH SUDAN | 21,038 | 272,330 | -251,292 | -92.27% |
| IRAQ | 19,680 | 14,229 | 5,451 | 38.31% |
| SINGAPORE | 15,000 | 23,100 | -8,100 | -35.06% |
| ISRAEL | 12,939 | 20,080 | -7,141 | -35.56% |
| GABON | 11,555 | | 11,555 | |
| MALTA | 10,760 | | 10,760 | |
| MALI | 10,348 | 5,174 | 5,174 | 100.00% |
| MAURITANIA | 10,348 | | 10,348 | |
| TANZANIA UNITED REPUBLIC OF | 6,196 | | 6,196 | |

| DESTINATION | 2025- QUANTITY KGS | 2024- QUANTITY KGS | QUANTITY VARIANCE KGS | %AGE VARIANCE |
|-------------------|--------------------------|--------------------------|--------------------------|------------------|
| BRAZIL | 5,829 | | 5,829 | |
| CAMEROON | 5,821 | | 5,821 | |
| SENEGAL | 5,310 | | 5,310 | |
| CHILE | 3,892 | | 3,892 | |
| MALAWI | 1,942 | | 1,942 | |
| SWAZILAND | 389 | 778 | -389 | -50.00% |
| CZECH REPUBLIC | 200 | | 200 | |
| ETHIOPIA | 20 | 52,844 | -52,824 | -99.96% |
| KYRGYZSTAN | | 48,000 | -48,000 | -100.00% |
| ROMANIA | | 25,280 | -25,280 | -100.00% |
| PERU | | 24,000 | -24,000 | -100.00% |
| UZBEKISTAN | | 23,400 | -23,400 | -100.00% |
| BURKINA FASO | | 10,348 | -10,348 | -100.00% |
| MEXICO | | 9,000 | -9,000 | -100.00% |
| BAHRAIN | | 8,496 | -8,496 | -100.00% |
| BANGLADESH | | 7,200 | -7,200 | -100.00% |
| GUINEA | | 5,174 | -5,174 | -100.00% |
| ITALY | | 4,600 | -4,600 | -100.00% |
| INDONESIA | | 2,600 | -2,600 | -100.00% |
| MYANMAR | | 189 | -189 | -100.00% |
| GRAND TOTAL | 47,219,406 | 47,429,181 | (209,775) | -0.44% |


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